Custom Yacht Owner Worksheet

Use this blank worksheet to prepare for a conversation. Leave uncertain answers open.

Your cruising life

Primary cruising region and preferred home port:

Typical trip length and time spent at anchor or in marinas:

A less frequent trip the yacht should also support:

Main activities: Family cruising / Entertaining / Fishing / Extended passages / Exploring / Other

Intended use: Private / Commercial / Undecided

People and accommodations

Typical guests aboard: Maximum overnight guests:

Preferred number of guest cabins:

Operating plan: Owner operated / Professional crew / Mixed arrangement / Undecided

Spaces, privacy, boarding, or movement needs that matter most:

Who should contribute to the brief:

Custom Yacht Owner Worksheet

Rank competing priorities and note where you would trade cost for comfort.

Performance and access

Rank your priorities: Cruising efficiency / Speed / Shallow-water access / Comfort / Storage

Known berth, length, beam, draft, or height constraints:

Which constraints still need verification:

Expected time between fuel, water, or provisioning stops:

Tender use and typical passengers or equipment:

Design and lifestyle

Three essentials and the reason for each:

1.

2.

3.

Three preferences you would consider trading against cost or complexity:

1.

2.

3.

Existing yachts or design references you admire and why:

An arrangement or ownership frustration you want to avoid:

Custom Yacht Owner Worksheet

Note the decisions that need a broker, designer or builder to verify.

Project boundaries

Initial total project investment range and what it includes:

Desired delivery period and degree of flexibility:

Starting point: Production with options / Semi-custom / Full-custom / Open to guidance

Preferred level of involvement: Major decisions only / Regular design reviews / Closely involved

Person who will consolidate decisions:

Three questions requiring professional investigation:

Your vision

Describe the experience that would make this yacht feel your own:

Brief date and next review point: